

Date	2-11-2025
Team id	NM2025TMID04066
Project name	Streamlining ticket support for efficient support operation
Team members	4

Project Planning Phase: Streamlining Ticket Support Operations

Objective

To develop a comprehensive and actionable plan that defines *how* the ticket support streamlining project will be executed, monitored, and controlled — ensuring clear scope, resources, timelines, and risk mitigation.

Key Goals

1. Define clear **project scope**, deliverables, and success criteria.
2. Develop a **work breakdown structure (WBS)** with realistic timelines.
3. Allocate **resources** (people, technology, and budget).
4. Identify **dependencies and risks** with mitigation strategies.
5. Create a **communication and change management plan**.
6. Finalize **project governance** (roles, responsibilities, and reporting structure).

Major Planning Activities

Activity	Description	Key Outputs
1. Define Project Scope	Identify which support operations will be improved (ticket routing, automation, agent tools, analytics, etc.) and which are out of scope.	Scope statement, inclusion/exclusion list
2. Develop Work Breakdown Structure (WBS)	Break the project into manageable tasks (e.g., discovery, design, build, pilot, rollout).	WBS diagram, task list
3. Schedule & Timeline Planning	Create a detailed timeline with milestones for each phase (e.g., Discovery, Solution Design, Implementation).	Gantt chart / project timeline

Activity	Description	Key Outputs
4. Resource & Budget Planning	Identify required resources: tools, personnel (agents, IT, AI specialists), and financial costs.	Resource allocation plan, budget estimate
5. Risk Assessment & Mitigation	Identify potential risks (e.g., system downtime, data migration issues, agent resistance). Develop mitigation and contingency plans.	Risk register, mitigation strategy
6. Communication Plan	Define how stakeholders will receive updates, and what information will be shared (status reports, dashboards).	Communication matrix, reporting cadence
7. Quality Management Plan	Define how process improvements will be measured and validated (SLAs, QA metrics, CSAT).	Quality standards document
8. Change Management Strategy	Outline training, support, and adoption tactics for new workflows and tools.	Change management plan
9. Procurement Planning (if needed)	If new tools (AI routing, chatbots, ticketing platforms) are to be procured, define vendor selection and evaluation process.	Procurement plan, vendor evaluation matrix
10. Approval & Baseline Setup	Present the complete project plan for stakeholder approval and baseline establishment.	Approved project plan, project baseline

Stakeholders and Roles

Role	Responsibility
Project Manager	Lead planning phase, develop timeline, manage documentation
Support Operations Lead	Define process improvement scope, identify bottlenecks
IT/Systems Architect	Identify technical dependencies, integrations, and tool requirements
Automation/AI Specialist	Evaluate automation opportunities and AI integration potential
Finance/Procurement	Approve budgets, manage vendor engagement
Change Management Lead	Develop communication and training plans
Executive Sponsor	Approve project plan and allocate resources

Deliverables from the Planning Phase

1. ✓ **Project Charter (Updated)** — with clarified objectives and scope
 2. ✓ **Detailed Project Plan** — including WBS, schedule, and dependencies
 3. ✓ **Resource & Budget Plan**
 4. ✓ **Risk Management Plan**
 5. ✓ **Communication & Governance Plan**
 6. ✓ **Change Management & Training Plan**
 7. ✓ **Baseline KPIs** (for measuring improvement post-implementation)
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Success Criteria for the Planning Phase

- All deliverables approved by key stakeholders.
- Project scope, milestones, and KPIs clearly defined and documented.
- All risks have documented mitigation strategies.
- Project team roles and responsibilities are confirmed.
- Go-ahead sign-off granted to proceed to **Execution Phase**.